

## Exhibit 300: Capital Asset Plan and Business Case Summary

### Part I: Summary Information And Justification (All Capital Assets)

#### Section A: Overview

1. **Date of Submission:** 2010-09-17

2. **Agency:** 184

3. **Bureau:** 15

4. **Name of this Investment:** Phoenix - Financial System Integration (FSI)

5. **Unique Project (Investment) Identifier (UPI):** 184-15-01-01-01-1000-00

6. **What kind of investment will this be in FY 2012?:** Mixed Life Cycle

- Planning
- Full Acquisition
- Operations and Maintenance
- Mixed Life Cycle
- Multi-Agency Collaboration

7. **What was the first budget year this investment was submitted to OMB?** FY2001 or earlier

8.

- a. **Provide a brief summary of the investment and justification, including a brief description of how this closes in part or in whole an identified agency performance gap, specific accomplishments expected by the budget year and the related benefit to the mission, and the primary beneficiary(ies) of the investment.**

Phoenix is USAID's core financial management system and the Agency's accounting system of record. By providing accurate and timely financial information and by automating the Agency's financial business processes, Phoenix enables USAID to effectively and efficiently analyze, allocate and report on US foreign assistance funds. The Phoenix project is in its post-deployment Steady State phase, which includes system operations and maintenance, user support, interface maintenance and development, system enhancements, business process improvements, and the extension of Phoenix as an integral component of Agency operations. The Phoenix system complies with federal accounting standards and security requirements. In FY 2012, as the Agency continues to modernize, Phoenix will remain the cornerstone of financial operations and interface with new initiatives and systems. In addition to necessary maintenance activities, USAID plans to take on small Phoenix initiatives to: Support new US government and USAID initiatives; Accommodate evolving priorities, organizational structure and business needs at USAID; Accommodate changing regulations & address audit findings; and update and standardize business processes in order to take advantage of additional software features and avoid the cost and risk associated with software customizations. As USAID's worldwide financial management system, Phoenix supports the Agency's strategic foreign policy objectives and goals. Phoenix aligns with USAID's Foreign Assistance Framework, allowing Agency staff to monitor, in real-time, the manner in which financial obligations support the Objectives defined in the USAID/Department of State Joint Strategic Plan. In recognition of the federal government's increased emphasis on information transparency, enhancements to financial reporting and data validation will not only increase the efficiency of Agency financial management, but also support "Open Government" initiatives, benefiting external stakeholders such as the US public.

- b. **Provide any links to relevant websites that would be useful to gain additional information on the investment including links to GAO and IG reports.**

Title	Link
NONE	

9.

- a. **Provide the date of the Agency's Executive/Investment Committee approval of this investment.**  
2009-06-01
- b. **Provide the date of the most recent or planned approved project charter.** 2009-08-24

10. **Contact information?**

- a. **Program/Project Manager Name:** \*  
**Phone Number:** \*  
**Email:** \*
- b. **Business Function Owner Name (i.e. Executive Agent or Investment Owner):** David Ostermeyer  
**Phone Number:** \*  
**Email:** \*

**11. What project management qualifications does the Project Manager have? (choose only one per FAC-P/PM or DAWIA):** Project manager has been validated according to FAC-P/PM or DAWIA criteria as qualified for this investment.

- Project manager has been validated according to FAC-P/PM or DAWIA criteria as qualified for this investment.
- Project manager qualifications according to FAC-P/PM or DAWIA criteria is under review for this investment.
- Project manager assigned to investment, but does not meet requirements according to FAC-P/PM or DAWIA criteria.
- Project manager assigned but qualification status review has not yet started.
- No project manager has yet been assigned to this investment.

## Section B: Summary of Funding (Budget Authority for Capital Assets)

1.

Table I.B.1: Summary of Funding

(In millions of dollars)

(Estimates for BY+1 and beyond are for planning purposes only and do not represent budget decisions)

	PY-1 and earlier	PY 2010	CY 2011 (CY Continuing Resolution)	BY 2012	BY+1 2013	BY+2 2014	BY+3 2015	BY+4 and beyond	Total
Planning:	*	*	*	*	*	*	*	*	*
Acquisition:	*	*	*	*	*	*	*	*	*
Planning & Acquisition Government FTE Costs	*	*	*	*	*	*	*	*	*
Subtotal Planning & Acquisition(DME):	*	*	*	*	*	*	*	*	*
Operations & Maintenance:	*	*	*	*	*	*	*	*	*
Disposition Costs (optional):	*	*	*	*	*	*	*	*	*
Operations, Maintenance, Disposition Government FTE Costs	*	*	*	*	*	*	*	*	*
Subtotal O&M and Disposition Costs (SS):	*	*	*	*	*	*	*	*	*
TOTAL FTE Costs	*	*	*	*	*	*	*	*	*
TOTAL (not including FTE costs):	*	*	*	*	*	*	*	*	*
TOTAL (including FTE costs):	*	*	*	*	*	*	*	*	*
Number of FTE represented by	*	*	*	*	*	*	*	*	*

**Table I.B.1: Summary of Funding**  
**(In millions of dollars)**

(Estimates for BY+1 and beyond are for planning purposes only and do not represent budget decisions)

	PY-1 and earlier	PY 2010	CY 2011 (CY Continuing Resolution)	BY 2012	BY+1 2013	BY+2 2014	BY+3 2015	BY+4 and beyond	Total
Costs:									

2. Insert the number of years covered in the column “PY-1 and earlier”: 12

3. Insert the number of years covered in the column “BY+4 and beyond”: \*

4. If the summary of funding has changed from the FY 2011 President’s Budget request, briefly explain those changes:

\*

## Section C: Acquisition/Contract Strategy (All Capital Assets)

1.

Table I.C.1 Contracts Table

Contract Status	Contracting Agency ID	Procurement Instrument Identifier (PIID)	Indefinite Delivery Vehicle (IDV) Reference ID	Solicitation ID	Alternative financing	EVM Required	Ultimate Contract Value (M)	Type of Contract/Task Order (Pricing)	Is the contract a Performance Based Service Acquisition (PBSA)?	Effective date	Actual or expected End Date of Contract/Task Order	Extent Completed	Short description of acquisition
Awarded	7200	<a href="#">AIDIRME070500020</a>	AIDIRME00050020		*	*	\$3.9		Y	2007-07-17	2011-06-30	N	This task order is in support of the Phoenix steady state project and the program management support in the M/CIO and M/CFO.TAS::721000::TAS
Awarded	7200	<a href="#">AIDCIOC0800002</a>			*	*	\$1.9	Labor Hours	N	2008-08-01	2013-07-31	Y	ASIS, Inc. - Analytical Support for Financial Systems work in the Bureau for Management, Office of the Chief Financial Officer, Financial Systems Division (M/CFO/FS)

Table I.C.1 Contracts Table

Contract Status	Contracting Agency ID	Procurement Instrument Identifier (PIID)	Indefinite Delivery Vehicle (IDV) Reference ID	Solicitation ID	Alternative financing	EVM Required	Ultimate Contract Value (M)	Type of Contract/Task Order (Pricing)	Is the contract a Performance Based Service Acquisition (PBSA)?	Effective date	Actual or expected End Date of Contract/Task Order	Extent Completed	Short description of acquisition
Awarded	7200	<a href="#">AIDCIOM1000001</a>	SAQMMA10A0058		*	*	\$6.2	Firm Fixed Price	N	2010-03-10	2015-02-28	Y	Phoenix Systems Support Task Order under the Department of State BPA SAQMMA10 A0058
Awarded	7200	<a href="#">AIDIRMM00050001500</a>	GS35F4797H		*	*	\$7.3	Firm Fixed Price	N	2005-04-28	2008-01-22	N	CCRC Licenses and Maintenance plus FY07 Maintenance cost -- all other terms and conditions remain unchanged

2. If earned value is not required or will not be a contract requirement for any of the contracts or task orders above, explain why:

\*

3.

a. Has an Acquisition Plan been developed? If yes, please answer the questions that follow \*

b. Does the Acquisition Plan reflect the requirements of FAR Subpart 7.1 \*

c. Was the Acquisition Plan approved in accordance with agency requirements \*

d.If "yes," enter the date of approval? \*

e.Is the acquisition plan consistent with your agency Strategic Sustainability Performance Plan? \*

f.Does the acquisition plan meet the requirements of EOs 13423 and 13514? \*

g.If an Acquisition Plan has not been developed, provide a brief explanation.

\*

## Part II: IT Capital Investments

### Section A: General

1.
  - a. **Confirm that the IT Program/Project manager has the following competencies: configuration management, data management, information management, information resources strategy and planning, information systems/network security, IT architecture, IT performance assessment, infrastructure design, systems integration, systems life cycle, technology awareness, and capital planning and investment control.** yes
  - b. **If not, confirm that the PM has a development plan to achieve competencies either by direct experience or education.**
2. **Describe the progress of evaluating cloud computing alternatives for service delivery to support this investment.** Plans to implement cloud computing will depend on USAID's enterprise solution, which is currently in the planning process. Once the enterprise solution has been formed, cloud computing alternatives for Phoenix will be evaluated.
3. **Provide the date of the most recent or planned Quality Assurance Plan** 2010-09-30
4.
  - a. **Provide the UPI of all other investments that have a significant dependency on the successful implementation of this investment.** 184-15-01-01-01-4061-00
  - b. **If this investment is significantly dependent on the successful implementation of another investment(s), please provide the UPI(s).**
5. **An Alternatives Analysis must be conducted for all Major Investments with Planning and Acquisition (DME) activities and evaluate the costs and benefits of at least three alternatives and the status quo. The details of the analysis must be available to OMB upon request. Provide the date of the most recent or planned alternatives analysis for this investment.** 2002-07-31
6. **Risks must be actively managed throughout the lifecycle of the investment. The Risk Management Plan and risk register must be available to OMB upon request. Provide the date that the risk register was last updated.** 2010-08-27



## Section B: Cost and Schedule Performance

Table II.B.1. Comparison of Actual Work Completed and Actual Costs to Current Approved Baseline:

Description of Activity	DME or SS	Agency EA Transition Plan Milestone Identifier	Planned Cost (\$M)	Actual Cost (\$M)	Planned Start Date	Actual Start Date	Planned Completion Date	Actual Completion Date	Planned Percent Complete	Actual Percent Complete
Acquisition planning, solicitation, and award.	DME	*	\$6.9	\$6.9	1999-09-06	1999-09-06	1999-09-07	1999-09-07	100.00%	100.00%
Initial operational capability of compliant COTS core financial system for Washington financial operations, interfaces, and sustained financial operations.	DME	*	\$26.2	\$25.5	2001-09-03	2001-09-03	2001-09-04	2001-09-04	100.00%	100.00%
Develop a comprehensive deployment plan and pilot Momentum in five missions.	DME	*	\$10.0	\$10.3	2004-07-07	2004-07-07	2004-08-30	2004-08-30	100.00%	100.00%
Mission deployment of integrated financial management system to missions with a Controller.	DME	*	\$20.9	\$13.8	2006-06-30	2006-06-30	2006-07-01	2006-07-01	100.00%	100.00%
This milestone reflects the core accounting system's post-deployment Steady State support for FY	SS	*	\$6.6	\$6.6	2001-10-01	2001-10-01	2002-09-30	2002-09-30	100.00%	100.00%

Table II.B.1. Comparison of Actual Work Completed and Actual Costs to Current Approved Baseline:

Description of Activity	DME or SS	Agency EA Transition Plan Milestone Identifier	Planned Cost (\$M)	Actual Cost (\$M)	Planned Start Date	Actual Start Date	Planned Completion Date	Actual Completion Date	Planned Percent Complete	Actual Percent Complete
2002. This phase contains all the operations and maintenance for the Phoenix system.										
This milestone reflects the core accounting system's post-deployment Steady State support for FY 2003. This phase contains all the operations and maintenance for the Phoenix system.	SS	*	\$5.6	\$5.6	2002-10-01	2002-10-01	2003-09-30	2003-09-30	100.00%	100.00%
This milestone reflects the core accounting system's post-deployment Steady State support for FY 2004. This phase contains all the operations and maintenance for the Phoenix system.	SS	*	\$7.2	\$7.2	2003-10-01	2003-10-01	2004-09-30	2004-09-30	100.00%	100.00%
This milestone reflects the core accounting system's post-deployment Steady State support for FY 2005. This phase contains all the	SS	*	\$5.5	\$5.5	2004-10-01	2004-10-01	2005-09-30	2005-09-30	100.00%	100.00%

Table II.B.1. Comparison of Actual Work Completed and Actual Costs to Current Approved Baseline:

Description of Activity	DME or SS	Agency EA Transition Plan Milestone Identifier	Planned Cost (\$M)	Actual Cost (\$M)	Planned Start Date	Actual Start Date	Planned Completion Date	Actual Completion Date	Planned Percent Complete	Actual Percent Complete
operations and maintenance for the Phoenix system.										
This milestone reflects the core accounting system's post-deployment Steady State support for FY 2006. This phase contains all the operations and maintenance for the Phoenix system.	SS	*	\$4.6	\$4.6	2005-10-01	2005-10-01	2006-09-30	2006-09-30	100.00%	100.00%
This milestone reflects the core accounting system's post-deployment Steady State support for FY 2007. This phase contains all the operations and maintenance for the Phoenix system.	SS	*	\$5.5	\$5.5	2006-10-01	2006-10-01	2007-09-30	2007-09-30	100.00%	100.00%
This milestone reflects the core accounting system's post-deployment Steady State support for FY 2008. This phase contains all the operations and maintenance for	SS	*	\$3.4	\$3.4	2007-10-01	2007-10-01	2008-09-30	2008-09-30	100.00%	100.00%

Table II.B.1. Comparison of Actual Work Completed and Actual Costs to Current Approved Baseline:

Description of Activity	DME or SS	Agency EA Transition Plan Milestone Identifier	Planned Cost (\$M)	Actual Cost (\$M)	Planned Start Date	Actual Start Date	Planned Completion Date	Actual Completion Date	Planned Percent Complete	Actual Percent Complete
the Phoenix system.										
This milestone reflects the core accounting system's post-deployment Steady State support for FY 2009. This phase contains all the operations and maintenance for the Phoenix system.	SS	*	\$4.7	\$4.7	2008-10-01	2008-10-01	2009-09-30	2009-09-30	100.00%	100.00%
This milestone reflects the core accounting system's post-deployment Steady State support for FY 2010. This phase contains all the operations and maintenance for the Phoenix system	SS	*	\$16.9	\$16.9	2009-10-01	2009-10-01	2010-09-30	2010-09-30	100.00%	100.00%
FY 2011 Q1 Steady State support. Includes software support, interface maintenance, hardware and software costs, license fees, program management and user education & support.	SS	*	\$2.9	\$2.9	2010-10-01	2010-10-01	2010-12-31	2010-12-31	100.00%	100.00%

Table II.B.1. Comparison of Actual Work Completed and Actual Costs to Current Approved Baseline:

Description of Activity	DME or SS	Agency EA Transition Plan Milestone Identifier	Planned Cost (\$M)	Actual Cost (\$M)	Planned Start Date	Actual Start Date	Planned Completion Date	Actual Completion Date	Planned Percent Complete	Actual Percent Complete
FY 2011 Q2 Steady State support. Includes software support, interface maintenance, hardware and software costs, license fees, program management and user education & support.	SS	*	\$2.9	\$2.9	2011-01-01	2011-01-01	2011-03-31	2011-03-31	100.00%	100.00%
FY 2011 Q3 Steady State support. Includes software support, interface maintenance, hardware and software costs, license fees, program management and user education & support.	SS	*	\$2.9	\$2.4	2011-04-01	2011-04-01	2011-06-30	2011-06-30	100.00%	100.00%
FY 2011 Q4 Steady State support. Includes software support, interface maintenance, hardware and software costs, license fees, program management and user education & support.	SS	*	\$2.9	\$0.0	2011-07-01	2011-07-01	2011-09-30		0.00%	0.00%
FY 2011 Q1 Phoenix	DME	*	\$0.5	\$0.5	2010-10-01	2010-10-01	2010-12-31	2010-12-31	100.00%	100.00%

Table II.B.1. Comparison of Actual Work Completed and Actual Costs to Current Approved Baseline:

Description of Activity	DME or SS	Agency EA Transition Plan Milestone Identifier	Planned Cost (\$M)	Actual Cost (\$M)	Planned Start Date	Actual Start Date	Planned Completion Date	Actual Completion Date	Planned Percent Complete	Actual Percent Complete
Enhancements. Includes reporting improvements, software enhancements, development of new interfaces, and business process improvements to enable USAID to make use of additional software features.										
FY 2011 Q2 Phoenix Enhancements. Includes reporting improvements, software enhancements, development of new interfaces, and business process improvements to enable USAID to make use of additional software features.	DME	*	\$0.5	\$0.5	2011-01-01	2011-01-01	2011-03-31	2011-03-31	100.00%	100.00%
FY 2011 Q3 Phoenix Enhancements. Includes reporting improvements, software enhancements, development of new interfaces, and business	DME	*	\$0.5	\$0.5	2011-04-01	2011-04-01	2011-06-30	2011-06-30	100.00%	100.00%

Table II.B.1. Comparison of Actual Work Completed and Actual Costs to Current Approved Baseline:

Description of Activity	DME or SS	Agency EA Transition Plan Milestone Identifier	Planned Cost (\$M)	Actual Cost (\$M)	Planned Start Date	Actual Start Date	Planned Completion Date	Actual Completion Date	Planned Percent Complete	Actual Percent Complete
process improvements to enable USAID to make use of additional software features.										
FY 2011 Q4 Phoenix Enhancements. Includes reporting improvements, software enhancements, development of new interfaces, and business process improvements to enable USAID to make use of additional software features.	DME	*	\$0.5	\$0.0	2011-07-01	2011-07-01	2011-09-30		0.00%	0.00%
FY 2012 Q1 Steady State support. Includes software support, interface maintenance, hardware and software costs, license fees, program management and user education & support.	SS	*	\$2.6	\$0.0	2011-10-01		2011-12-31		0.00%	0.00%
FY 2012 Q2 Steady State support. Includes software support, interface	SS	*	*	*	2012-01-01	*	2012-03-31	*	*	*

Table II.B.1. Comparison of Actual Work Completed and Actual Costs to Current Approved Baseline:

Description of Activity	DME or SS	Agency EA Transition Plan Milestone Identifier	Planned Cost (\$M)	Actual Cost (\$M)	Planned Start Date	Actual Start Date	Planned Completion Date	Actual Completion Date	Planned Percent Complete	Actual Percent Complete
maintenance, hardware and software costs, license fees, program management and user education & support.										
FY 2012 Q3 Steady State support. Includes software support, interface maintenance, hardware and software costs, license fees, program management and user education & support.	SS	*	*	*	2012-04-01	*	2012-06-30	*	*	*
FY 2012 Q4 Steady State support. Includes software support, interface maintenance, hardware and software costs, license fees, program management and user education & support.	SS	*	*	*	2012-07-01	*	2012-09-30	*	*	*
FY 2012 Q1 Phoenix Enhancements. Includes reporting improvements, software	DME	*	\$0.4	\$0.0	2011-10-01		2011-12-31		0.00%	0.00%



Table II.B.1. Comparison of Actual Work Completed and Actual Costs to Current Approved Baseline:

Description of Activity	DME or SS	Agency EA Transition Plan Milestone Identifier	Planned Cost (\$M)	Actual Cost (\$M)	Planned Start Date	Actual Start Date	Planned Completion Date	Actual Completion Date	Planned Percent Complete	Actual Percent Complete
enhancements, development of new interfaces, and business process improvements to enable USAID to make use of additional software features.										
FY 2012 Q2 Phoenix Enhancements. Includes reporting improvements, software enhancements, development of new interfaces, and business process improvements to enable USAID to make use of additional software features.	DME	*	*	*	2012-01-01	*	2012-03-31	*	*	*
FY 2012 Q3 Phoenix Enhancements. Includes reporting improvements, software enhancements, development of new interfaces, and business process improvements to enable USAID to make use of additional	DME	*	*	*	2012-04-01	*	2012-06-30	*	*	*

Table II.B.1. Comparison of Actual Work Completed and Actual Costs to Current Approved Baseline:

Description of Activity	DME or SS	Agency EA Transition Plan Milestone Identifier	Planned Cost (\$M)	Actual Cost (\$M)	Planned Start Date	Actual Start Date	Planned Completion Date	Actual Completion Date	Planned Percent Complete	Actual Percent Complete
software features.										
FY 2012 Q4 Phoenix Enhancements. Includes reporting improvements, software enhancements, development of new interfaces, and business process improvements to enable USAID to make use of additional software features.	DME	*	*	*	2012-07-01	*	2012-09-30	*	*	*

2. If the investment cost, schedule, or performance variances are not within 10 percent of the current baseline, provide a complete analysis of the reasons for the variances, the corrective actions to be taken, and the most likely estimate at completion.

3. For mixed lifecycle or operations and maintenance investments an Operational Analysis must be performed annually. Operational analysis may identify the need to redesign or modify an asset by identifying previously undetected faults in design, construction, or installation/integration, highlighting whether actual operation and maintenance costs vary significantly from budgeted costs, or documenting that the asset is failing to meet program requirements. The details of the analysis must be available to OMB upon request. Insert the date of the most recent or planned operational analysis.

2010-11-12

4. Did the Operational analysis cover all 4 areas of analysis: Customer Results, Strategic and Business Results, Financial Performance, and Innovation?

Section C: Financial Management Systems

Table II.C.1: Financial Management Systems			
System(s) Name	System acronym	Type of Financial System	BY Funding

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\*

\*

Section D: Multi-Agency Collaboration Oversight (For Multi-Agency Collaborations only)

Table II.D.1. Customer Table:	
Customer Agency	Joint exhibit approval date
NONE	

Table II.D.2. Shared Service Providers		
Shared Service Provider (Agency)	Shared Service Asset Title	Shared Service Provider Exhibit 53 UPI (BY 2011)
*	*	*

Table II.D.3. For IT Investments, Partner Funding Strategies (\$millions):							
Partner Agency	Partner exhibit 53 UPI (BY 2012)	CY Monetary Contribution	CY “In-Kind” Contribution	CY Fee-for-Service	BY Monetary Contribution	BY “In-Kind” Contribution	BY Fee-for-Service
NONE							

Table II.D.4. Legacy Systems Being Replaced		
Name of the Legacy Investment of Systems	Current UPI	Date of the System Retirement
*	*	*

## Section E: Performance Information

Table I.E.1a. Performance Metric Attributes

Measurement Area (For IT Assets)	Measurement Grouping (For IT Assets)	Measurement Indicator	Reporting Frequency	Unit of Measure	Performance Measure Direction	Baseline	Year Baseline Established for this measure (Origination Date)
Customer Results	Customer Satisfaction	Average user satisfaction as reported on surveys.	annual	Average rating of satisfaction on a scale of 0 (completely dissatisfied) to 10 (completely satisfied), as measured by responses to Phoenix-specific questions in user surveys of both Mission and Headquarters staff.	Steady	7	2010-09-15
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2012	7.5	TBD	Not Due	2010-09-17
Mission and Business Results	Continuity of Operations	Frequency of COOP tests	annual	Number of COOP tests	Steady	Annual COOP Test	2007-10-01
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2008	One COOP Test in FY2008	COOP exercises were conducted	Met	2010-09-17
Mission and Business Results	Continuity of Operations	Frequency of COOP tests	annual	Number of COOP tests	Steady	Annual COOP Tests	2008-10-01
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2009	Annual COOP Tests	COOP exercises were conducted	Met	2010-09-17
Mission and Business Results	Continuity of Operations	Frequency of COOP tests	annual	Number of COOP tests per year	Steady	1 per year	2009-10-01

			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2010	1 per year	One COOP test was successfully conducted	Met	2010-09-17
			2011	1 per year	TBD	Not Due	2010-12-27
			2012	1 per year	TBD	Not Due	2010-12-27
Mission and Business Results	Continuity of Operations	Frequency of COOP tests	annual	Number of COOP tests per year	Steady	1 per year	2010-09-15
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2011	1 per year	TBD	Not Due	2010-09-17
			2012	1 per year	TBD	Not Due	2010-09-17
Mission and Business Results	Funds Control	Percentage of appropriated Agency funds processed through Phoenix.	annual	Percentage - number of Agency funds processed in Phoenix divided by total number of Agency funds	Steady	100%	2007-10-01
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2008	100%	100%	Met	2010-09-17
			2009	100%	100%	Met	2010-12-27
			2010	100%	100%	Met	2010-12-27
Mission and Business Results	Funds Control	Percentage of appropriated Agency funds processed through Phoenix.	annual	Percentage - number of Agency funds processed in Phoenix divided by total number of Agency	Steady	100%	2008-10-01

			funds				
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2009	100%	100%	Met	2010-09-17
Mission and Business Results	Funds Control	Percentage of appropriated Agency funds processed through Phoenix.	annual	Percentage - number of Agency funds processed in Phoenix divided by total number of Agency funds	Steady	100%	2009-10-01
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2010	100%	TBD	Not Due	2010-09-17
Mission and Business Results	Funds Control	Percentage of appropriated agency funds processed through Phoenix.	annual	Percentage - number of Agency funds processed in Phoenix divided by total number of Agency funds	Steady	100%	2010-09-15
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2011	100%	TBD	Not Due	2010-09-17
			2012	100%	TBD	Not Due	2010-09-17
Mission and Business Results	Funds Control	Percentage of appropriated transactions processed through Phoenix.	annual	Percentage - number of appropriated transactions processed in Phoenix divided by total number of appropriated transactions	Steady	100%	2007-10-01
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2008	100%	100%	Met	2010-09-17

Mission and Business Results	Funds Control	Percentage of appropriated transactions processed through Phoenix.	2009	100%	100%	Met	2010-12-27
			2010	100%	100%	Met	2010-12-27
			2011	100%	TBD	Not Due	2010-12-27
			2012	100%	TBD	Not Due	2010-12-27
			annual	Percentage - number of appropriated transactions processed in Phoenix divided by total number of appropriated transactions	Steady	100%	2008-10-01
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2009	100%	100%	Met	2010-09-17
			2010	100%	TBD	Not Due	2010-09-17
Mission and Business Results	Funds Control	Percentage of appropriated transactions processed through Phoenix.	annual	Percentage - number of appropriated transactions processed in Phoenix divided by total number of appropriated transactions	Steady	100%	2009-10-01
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
Mission and Business Results	Funds Control	Percentage of appropriated transactions processed	annual	Percentage - number of appropriated transactions processed	Steady	100%	2010-09-15



through Phoenix.			in Phoenix divided by total number of appropriated transactions				
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2011	100%	TBD	Not Due	2010-09-17
			2012	100%	TBD	Not Due	2010-09-17
Mission and Business Results	Corrective Action	Percentage of audit recommendations closed within the fiscal year.	annual	Percentage - number of recommendations closed within one year divided by number of recommendations made within the fiscal year.	Steady	100%	2010-09-15
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2011	100%	TBD	Not Due	2010-09-17
			2012	100%	TBD	Not Due	2010-09-17
Processes and Activities	Productivity	Percentage of card transactions captured by the Phoenix credit card module.	annual	Number of credit card transactions captured by Phoenix divided by total number of credit card transactions	Steady	Credit card module captures 90% of purchase card transactions.	2007-10-01
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2008	90%	90%	Met	2010-09-17
Customer Results	Response Time	Percentage of help desk tickets that are either closed or for which a corrective action plan has been established	annual	Percentage - number of tickets closed or with a corrective action plan in place divided by total number of help desk	Steady	Phoenix Help Desk tickets are closed within one month or a corrective action is taken.	2007-10-01

		within one month.		tickets.			
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2008	100%	100%	Met	2010-09-17
			2009	100%	100%	Met	2010-12-27
Customer Results	Response Time	Percentage of help desk tickets that are either closed or for which a corrective action plan has been established within one month.	annual	Percentage - number of tickets closed or with a corrective action plan in place divided by total number of help desk tickets.	Steady	Phoenix Help Desk tickets are closed within one month or a corrective action is taken.	2008-10-01
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2009	100%	100%	Met	2010-09-17
Processes and Activities	Timeliness	Percentage of help desk tickets that are either closed or for which a corrective action plan has been established within one month.	annual	Percentage - number of tickets closed or with a corrective action plan in place divided by total number of help desk tickets.	Steady	100%	2009-10-01
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2010	100%	100%	Met	2010-12-27
Processes and Activities	Timeliness	Percentage of help desk tickets that are either closed or for which a corrective action plan has been established within one month.	monthly	Percentage - number of tickets closed or with a corrective action plan in place divided by total number of help desk tickets.	Steady	100%	2010-09-15
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated

			2011	100%	100%	Met	2010-12-27
			2012	100%	TBD	Not Due	2010-09-17
Processes and Activities	Productivity	Percentage of Phoenix transaction data mapped to the State/F Foreign Assistance Framework.	annual	Percentage - number of transactions mapped to Foreign Assistance Framework, divided by total number of transactions	Steady	99% of data is mapped to the new State/F Foreign Assistance Framework.	2007-10-01
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2008	99%	99%	Met	2010-09-17
Processes and Activities	Productivity	Percentage of Phoenix transaction data mapped to the State/F Foreign Assistance Framework.	annual	Percentage - number of transactions mapped to Foreign Assistance Framework, divided by total number of transactions	Steady	100% of data is mapped to agency State/F Framework	2008-10-01
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2009	100%	100%	Met	2010-09-17
Technology	Availability	Percentage of planned uptime during which Phoenix is available to users.	annual	Amount of time available to users, divided by total planned uptime, as reported in the Customer Service Standards report	Steady	Phoenix is available 99% of its planned uptime.	2007-10-01
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2008	99%	99%	Met	2010-09-17
			2009	99%	99%	Met	2010-12-27

Technology	Availability	Percentage of planned uptime during which Phoenix is available to users.	annual	Amount of time available to users, divided by total planned uptime, as reported in the Customer Service Standards report	Steady	Phoenix is available 99% of its planned uptime.	2008-10-01
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2009	99%	99%	Met	2010-09-17
Technology	Availability	Percentage of planned uptime during which Phoenix is available to users.	annual	Amount of time available to users, divided by total planned uptime, as reported in the Customer Service Standards report	Steady	99%	2009-10-01
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2010	99%	99.5%	Met	2010-12-27
Technology	Availability	Percentage of planned uptime during which Phoenix is available to users.	monthly	Amount of time available to users, divided by total planned uptime, as reported in the Customer Service Standards report	Steady	99%	2010-09-15
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated
			2011	99%	99.6%	Met	2011-05-20
			2012	99%	TBD	Not Due	2010-09-17
Customer Results	Service Availability	Time during which Phoenix is operational	annual	Average amount of time available during the reporting period, as reported in the Customer Service Standards report	Steady	24 x 6.5 Operations	2007-10-01
			Fiscal Year	Target	Actual Results	Target "Met" or "Not Met"	Last Updated

Customer Results	Service Availability	Time during which Phoenix is operational								
			2008	24 x 6.5 Operations	24 X 6.5 Operations	Met	2010-09-17			
			2009	24 x 6.5 Operations	24 X 6.5 Operations	Met	2010-12-27			
			2010	24 x 6.5 Operations	24 x 6.5 Operations	Met	2010-12-27			
			2011	24 x 6.5 Operations	TBD	Not Due	2010-12-27			
			annual	Average amount of time available during the reporting period, as reported in the Customer Service Standards report	Steady	24 x 6.5 Operations	2008-10-01			
			Fiscal Year	Target	Actual Results	Target “Met” or “Not Met”	Last Updated			
			2009	24 x 6.5 Operations	24 X 6.5 Operations	Met	2010-09-17			
			Customer Results	Service Availability	Time during which Phoenix is operational	annual	Average amount of time available during the reporting period, as reported in the Customer Service Standards report	Steady	24 x 6.5 Operations	2009-10-01
						Fiscal Year	Target	Actual Results	Target “Met” or “Not Met”	Last Updated
			2010	24 x 6.5 Operations	TBD	Not Due	2010-09-17			
			2011	24 x 6.5 Operations	TBD	Not Due	2010-09-17			

\* - Indicates data is redacted.